

Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

This Job Aid shows how to:

- Maintain company/organization information for COMMBUYS Vendor Account

Of Special Note:

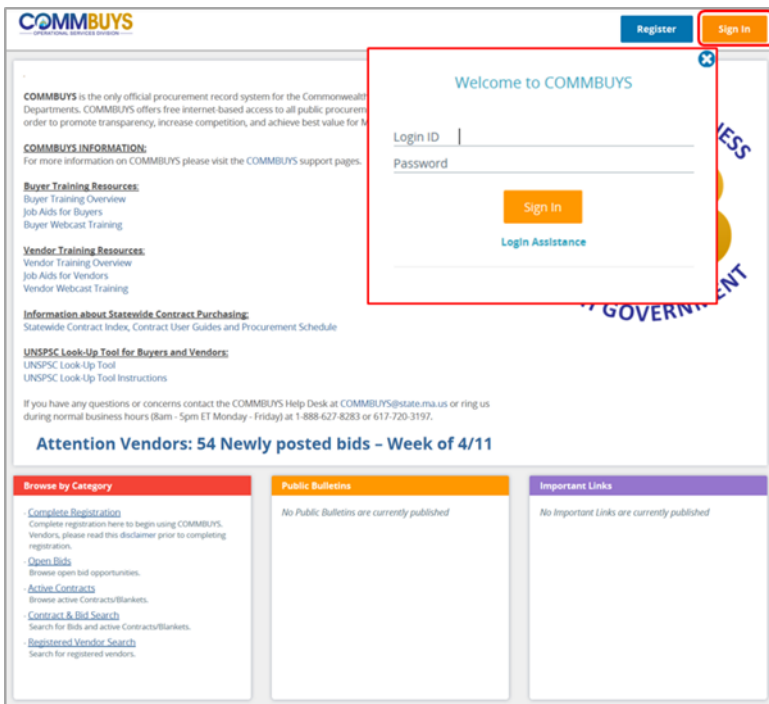
Only a Seller Administrator has the ability to maintain company/organization information such as: commodity codes, addresses, and users on the account. When entering or updating information, all asterisked (*) data fields must be completed before any information can be saved.

It is the responsibility of the Seller Administrator to maintain the company's information and ensure that the information provided is true and accurate.

These instructions assume the logged in user has Seller Administrator credentials.

Screenshot

Directions



Step 1: Launching COMMBUYS

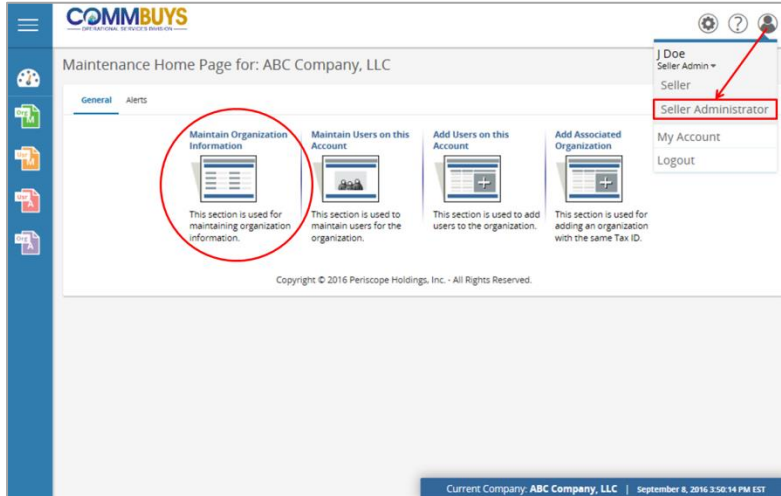
1. Enter the uniform resource locator (URL) address for COMMBUYS (<https://www.commbuys.com>) or (commbuys.com) in your browser.
2. Once the COMMBUYS landing page displays click on the **Sign In** button.
3. Enter your **Login ID** and **Password** and sign in to COMMBUYS.

Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

Screenshot

Directions



Step 2: Accessing Maintenance Organization Tools

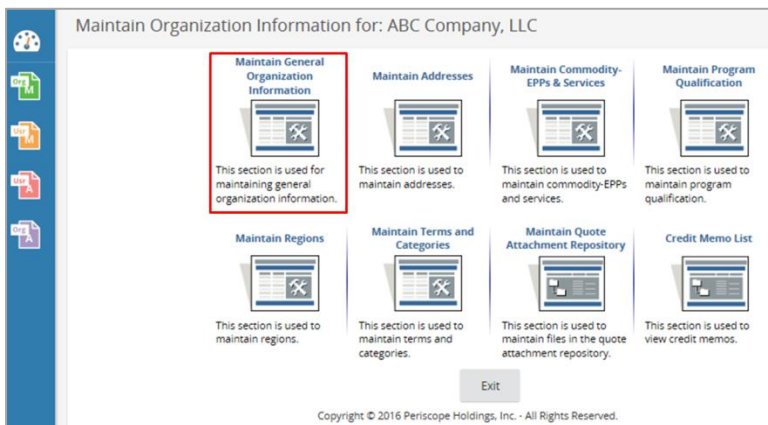
1. Click on the **Account** icon to ensure you are logged in as the Seller Administrator.
2. If not, select **Seller Administrator** from the dropdown found within **Account** icon.
3. Click on the **Maintain Organization Information** icon to access maintenance organization tools.
4. The **Maintain Organization Information** icon page displays. This page will allow you to edit and/or add information to maintain accurate records for your company.

Note: The **Maintain Regions** and **Credit Memo List** icons are not currently being used by the Commonwealth of Massachusetts.



Step 3: Accessing the Organization's General Information

1. Click on the **Maintain General Organization Information** icon on the **Maintain Organization Information** page to enter or update your company's default information including company name, business description, emergency contacts, and attachments.



Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

Screenshot

Directions

Maintain General Organization Information

Vendor ID: 00020006
 Company Name*: ABC Company, LLC Vendor Legal Name*: ABC Company, LLC
 DBA for Vendor:
 Tax ID #: 123321123 Country Code for Tax ID*: US - United States of America
 Is Tax ID # an Employer Identification Number (EIN) or a Social Security Number (SSN)?
☒ EIN ☐ SSN
 Incorporation Details: State: Year of Incorporation: 0
 Business Description:
 Preferred Delivery Method: Email
 Vendor Email: jdoe@abcc.com
 Vendor Fax:
 Emergency Supplier:
☐ Yes ☒ No
 Emergency Phone*: Ext.:
 Emergency Contact Name*:
 Emergency Email*:
 Emergency Info Comment:
 User Last Updated: J Doe
 Date Last Updated: 09/08/2016 12:54:02 PM

Attachments

No Attachments

File: Browse...
 Description:
 Upload

Forms

Click Add Form to add form attachments.

No Form Attachments

Add Form Save & Exit Save & Continue Reset Cancel & Exit

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Step 4: Updating the Organization's General Information

1. Use the **Maintain General Organization Information** page to manage your company's general information including:
 - Company Name
 - Vendor Legal Name
 - Country Code for Tax ID
 - Tax ID Type (EIN or SSN)
 - Incorporation Details (State and Year of Incorporation)
 - Business Description
 - Preferred Delivery Method
 - Vendor Email
 - Vendor Fax
 - Emergency Supplier (Yes or No. If yes complete the fields listed below.)
 - Emergency Phone
 - Emergency Contact Name
 - Emergency Email
 - Emergency Info Comment
2. To add an attachment to the Vendor Account, click on the **Browse** button.
3. Choose the file you would like to attach and click **Open**.
4. Briefly describe the attachment within the **Description** field.
5. Click the **Upload** button to finalize the attachment.
6. Click the **Save & Exit** button to return to the **Maintain Organization Information** page.

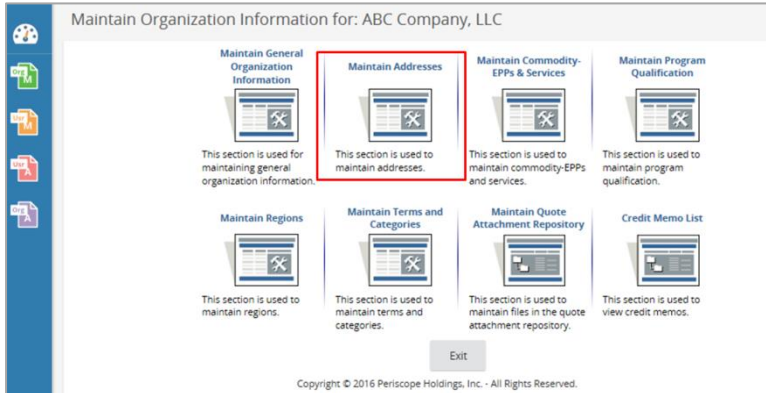
Note: The COMMBUYS-generated Vendor ID and the Tax ID that was entered upon initial registration cannot be modified.

Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

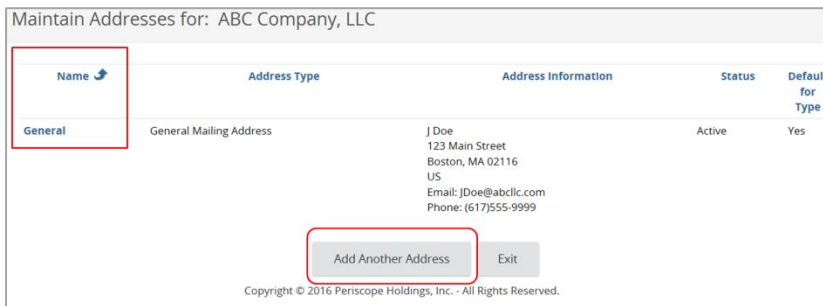
Screenshot

Directions



Step 5: Accessing the Organization's Addresses

1. Click on the **Maintain Addresses** icon on the **Maintain Organization Information** page to update current addresses or add additional addresses.



Step 6: Maintaining Addresses

1. Click on the hyperlinked address name for the address that requires updating.
2. Click on the **Add Another Address** button to add a new address.

Note: If the word **Edit** is displayed in the **Name** column, click **Edit** to open a detailed view of the address and update the **Name this Address** field accordingly.

Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

Screenshot

Directions

Address Book - ABC Company, LLC

Enter a New Address

Address Type: Bid Mailing Address →

Bid Mailing Address
 Emergency Mailing Address
 Purchase Order Mailing Address
 Remit Address
 Sales Address

Name this Address*: _____

Contact Name*: _____

Address Line 1*: _____

Address Line 2: _____

Address Line 3: _____

Address Line 4: _____

Country*: US - United States of America ▼

City*: _____ State/Province*: _____

ZIP*: _____ County: _____

Phone*: _____ Ext: _____

Toll Free: _____ Mobile: _____

Fax: _____ Email*: _____

Id: 0 Alternate Id: _____

Status: Active ▼

Active
 Deleted
 Inactive
 Pending

☐ Default address for this address type (Begin with http:// or https://)

Save & Exit Reset Cancel & Exit

Step 7: Entering a New Address

1. Select the **Address Type** from the dropdown menu at the top of the screen.
2. Label the address by entering a brief description in the **Name this Address** field.
3. Continue completing the form by entering all of the required fields.
4. Select the **Status** of the address. By default, the address is marked **Active**.
5. To make the address the default for the **Address Type** selected, check the box next to **Default address for this address type**.
6. Click **Save & Exit** to return to the **Maintain Addresses** page.
7. Click **Exit** to return to the **Maintain Organization Information** page.

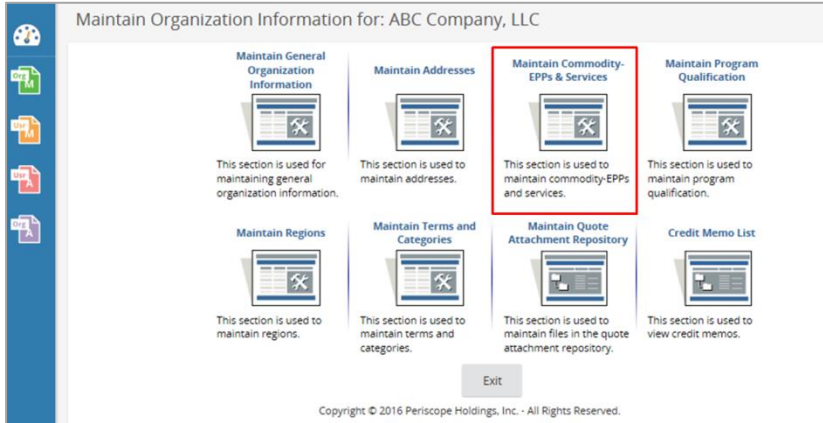
Note: An organization can have as many addresses as needed, but each address type is required to have a default.

Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

Screenshot

Directions



Step 8: Accessing the Commodity-EPP Maintenance Home Page

1. Click on the **Maintaining Commodity-EPP Codes & Services** icon on the **Maintain Organization Information** page

Note: COMMBUYS uses the United Nations Standard Products and Services Code ® (UNSPSC) commodity classification system. All vendors must have a least one UNSPSC commodity code associated with their vendor profile.

UNSPSC commodity codes determine which bid notifications you will receive; therefore selecting all possible codes to cast the widest net is encouraged.

Commodity-EPP Maintenance Home Page for: ABC Company, LLC



Step 9: Maintaining Commodity-EPP Codes & Services

1. Click on the **Maintain Commodity – EPPs** icon to add or remove commodity codes to and from the vendor profile.

Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

Screenshot

Directions

Commodity-EPP and Service Codes

Current Codes - ABC Company, LLC

Deactivate	Code	Description	Date Added
<input type="checkbox"/>	14-11-15	Printing and writing paper	09/08/2016
<input type="checkbox"/>	14-11-16	Novelty paper	09/08/2016

Deactivate Selected Items

Add Additional Codes

Cancel & Exit

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Step 10: Adding Commodity Codes

1. Click the **Add Additional Codes** button to add more codes to the vendor profile.

Commodity-EPP and Service Codes - ABC Company, LLC

Search

UNSPSC Segment-Family

UNSPSC Class

UNSPSC Keyword

Search using

ALL of the criteria

Search

UNSPSC Code Browse

Select the category that best describes the product and service you offer. Click on the question mark for more information.

- 00 Grants
- 10 Live Plant and Animal Material and Accessories and Supplies
- 11 Mineral and Textile and Inedible Plant and Animal Materials
- 12 Chemicals including Bio Chemicals and Gas Materials
- 13 Resin and Rosin and Rubber and Foam and Film and Elastomeric
- 14 Paper Materials and Products

Step 11: Searching for Commodity Codes

1. Search for codes by using the **Segment-Family** and **Class** dropdown menus or by using the **Keyword** search toward the top of the page.
2. You can also click through the hyperlinked codes listed at the bottom of the page to open further detailed UNSPSC segment numbers.

Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

Screenshot

Directions

Commodity-EPP and Service Codes - ABC Company, LLC

Search

UNSPSC Segment-Family: 14-12 - Industrial use papers

UNSPSC Class:

UNSPSC Keyword:

Search using: ALL of the criteria

Search

UNSPSC Code Browse Show Categories

Select the category that best describes the product and service you offer. Click on the question mark for more information.

Code	Description
<input checked="" type="checkbox"/> 14-12-00	Industrial use papers
<input type="checkbox"/> 14-12-15	Paperboard and packaging papers
<input checked="" type="checkbox"/> 14-12-16	Tissue papers
<input type="checkbox"/> 14-12-17	Laminated papers
<input checked="" type="checkbox"/> 14-12-18	Coated papers
<input type="checkbox"/> 14-12-19	Newsprint and offset papers
<input checked="" type="checkbox"/> 14-12-21	Uncoated base papers
<input type="checkbox"/> 14-12-22	Specialty industrial use papers

Save Save and Add More

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Step 12: Selecting Commodity Codes from Search Results

1. To select code(s) check the **Code** box next to the code(s) you wish to add.
2. Click the **Save and Add More** button to add the selected codes to the vendor profile and remain on this page to continue adding codes.
3. Click the **Save** button to add the selected codes to the vendor profile and return to the previous page.
4. Once saved, the codes will appear as current codes.
5. Click **Cancel & Exit** to return to the **Commodity-EPP Maintenance Home Page** when commodity code maintenance is complete.

Commodity-EPP and Service Codes

Current Codes - ABC Company, LLC

Deactivate	Code	Description	Date Added
<input type="checkbox"/>	14-11-15	Printing and writing paper	09/16/2016
<input type="checkbox"/>	14-11-16	Novelty paper	09/08/2016
<input type="checkbox"/>	14-12-00	Industrial use papers	09/16/2016
<input type="checkbox"/>	14-12-16	Tissue papers	09/16/2016
<input type="checkbox"/>	14-12-18	Coated papers	09/16/2016
<input type="checkbox"/>	14-12-21	Uncoated base papers	09/16/2016

Deactivate Selected Items Add Additional Codes **Cancel & Exit**

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Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

Screenshot

Directions

Commodity-EPP and Service Codes

Current Codes - ABC Company, LLC

Deactivate	Code	Description	Date Added
<input checked="" type="checkbox"/>	14-11-15	Printing and writing paper	09/16/2016
<input checked="" type="checkbox"/>	14-11-16	Novelty paper	09/08/2016
<input type="checkbox"/>	14-12-00	Industrial use papers	09/16/2016
<input type="checkbox"/>	14-12-16	Tissue papers	09/16/2016
<input type="checkbox"/>	14-12-18	Coated papers	09/16/2016
<input type="checkbox"/>	14-12-21	Uncoated base papers	09/16/2016

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Step 13: Removing Commodity Codes

1. To remove code(s) check the **Deactivate** box next to the code(s) in **Current Codes** list.
2. Click **Deactivate Selected Items** button.
3. Once the page refreshes itself and the selected code(s) are removed, click on the **Cancel & Exit** button to return to the **Commodity-EPP Maintenance Home Page**.

Commodity-EPP Maintenance Home Page for: ABC Company, LLC

Maintain Commodity-EPPs
 This section is used to add or remove commodity-EPPs.




Display Inactive Commodity-EPP
 This section is used to display inactive commodity-EPPs.

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Step 14: Reviewing Deactivated Commodity Codes

1. Click on the **Display Inactive Commodity-EPP** button from the **Commodity-EPP Maintenance Home Page**.

Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

Screenshot

Directions

Commodity-EPP and Service Codes

Inactive Codes for ABC Company, LLC

Activate	Code	Description	User Last Updated	Deactivated Date
<input checked="" type="checkbox"/>	14-11-16	Novelty paper	ABCLLC123	09/19/2016
<input checked="" type="checkbox"/>	14-12-00	Industrial use papers	ABCLLC123	09/19/2016
<input checked="" type="checkbox"/>	14-12-16	Tissue papers	ABCLLC123	09/19/2016
<input type="checkbox"/>	14-12-18	Coated papers	ABCLLC123	09/19/2016
<input type="checkbox"/>	14-12-21	Uncoated base papers	ABCLLC123	09/19/2016

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Step 15: Reactivating Commodity Codes

1. A list of commodity codes that were once active for the vendor profile is displayed.
2. To reactivate code(s) check the **Activate** box next to the code(s) that need to be reactivated.
3. Click on the **Save & Exit** button to return to the **Commodity-EPP Maintenance Home Page**.
4. Click **Exit** to return to the **Maintain Organization Information** page.

Maintain Organization Information for: ABC Company, LLC

Maintain General Organization Information

This section is used for maintaining general organization information.

Maintain Addresses

This section is used to maintain addresses.

Maintain Commodity-EPPs & Services

This section is used to maintain commodity-EPPs and services.

Maintain Program Qualification

This section is used to maintain program qualification.

Maintain Regions

This section is used to maintain regions.

Maintain Terms and Categories

This section is used to maintain terms and categories.

Maintain Quote Attachment Repository

This section is used to maintain files in the quote attachment repository.

Credit Memo List

This section is used to view credit memos.

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Step 16: Accessing the Maintain Terms and Categories Page

1. Click on the **Maintain Terms and Categories** icon from the **Maintain Organization Information** page.

Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

Screenshot

Directions

Terms, Categories, and Certifications - ABC Company, LLC

Terms

Categories & Certifications

Category: Disadvantaged Business Enterprise

Description: A check in "certified" indicates you are currently certified by the Massachusetts Supplier Diversity Office (SDO) as a Disadvantaged Business Enterprise (DBE). Note that, once your COMMBUYS registration is complete, your selection will be validated against the SDO Directory of Certified Businesses. The database is available for search at the following link.

☐ Not Certified
☐ DBE Certified

Category: DOBE Category

Please select at most one category value

Select

☐ Not Certified
☐ DOBE Certified

Notes:

Category: DUNS Number

Please select at most one category value

Select

☐ This is the DUNS number assigned to my Business

Notes:

Category: Environmentally Preferable Product

Description: Does your company sell environmentally preferable products or services (EPP)? EPPs are products and services that have a lesser or reduced effect on human health and the environment when compared to competing products or services that serve the same purpose. They may include, but not be limited to items that contain recycled materials, minimal waste and conserve energy and/or water and reduce the amount of toxic substances disposed or consumed, protect open space or lessen the impact to public health. Category URL: <http://www.mass.gov/epp>

Please select at most one category value

Select

☐ No
☐ Yes

Notes:

Category: Lesbian, Gay, Bisexual and Transgender Owned Business Enterprise

Description: A check in "certified" indicates you are currently certified by the Massachusetts Supplier Diversity Office (SDO) as a Lesbian, Gay, Bisexual and Transgender Business Enterprise (LGBTBE). Note that, once your COMMBUYS registration is complete, your selection will be validated against the SDO Directory of Certified Businesses. The database is available for search at the following link.

☐ Not Certified
☐ LGBTBE Certified

Category: Minority Owned Business Enterprise

Description: A check in "certified" indicates you are currently certified by the Massachusetts Supplier Diversity Office (SDO) as a Minority Business Enterprise (MBE). Note that, once your COMMBUYS registration is complete, your selection will be validated against the SDO Directory of Certified Businesses. The database is available for search at the following link. Category URL: <http://www.mass.gov/sdo>

☐ Not Certified
☐ MBE Certified

Step 17: Maintaining Terms and Categories

1. To edit the categories associated with the vendor profile, check the appropriate box under the categories that need to be updated.
2. Once you are finished click **Save & Exit** at the bottom of the page to return to the previous page.

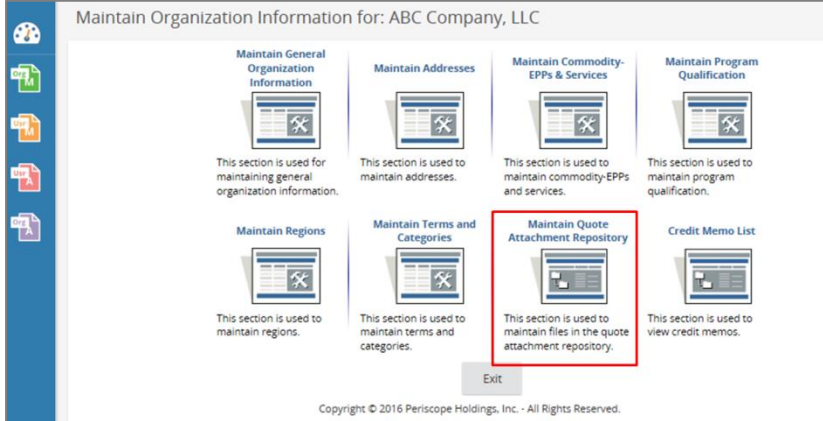
Note: Some categories such as MBE and WBE certifications cannot be self-selected as they require Commonwealth approval and will be selected internally by the Commonwealth.

Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

Screenshot

Directions



Maintain Organization Information for: ABC Company, LLC

Maintain General Organization Information
This section is used for maintaining general organization information.

Maintain Addresses
This section is used to maintain addresses.

Maintain Commodity-EPPs & Services
This section is used to maintain commodity-EPPs and services.

Maintain Program Qualification
This section is used to maintain program qualification.

Maintain Regions
This section is used to maintain regions.

Maintain Terms and Categories
This section is used to maintain terms and categories.

Maintain Quote Attachment Repository
This section is used to maintain files in the quote attachment repository.

Credit Memo List
This section is used to view credit memos.

Exit

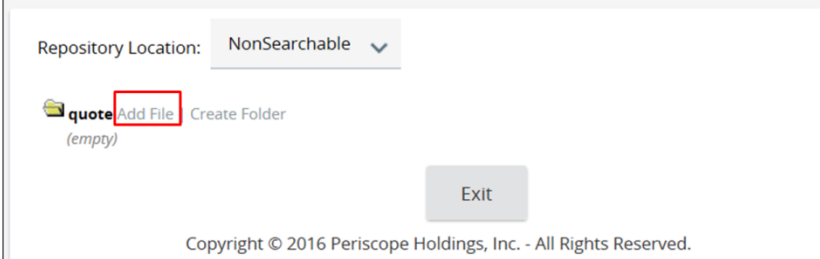
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Step 18: Accessing Quote Attachment Repository Page

1. Click on the **Maintain Quote Attachment Repository** icon from the **Maintain Organization Information** homepage.

Note: Attachments can be added as a file and/or as a folder to the repository. Once created this repository is viewable by the vendor users and buyers.

Attachment Repository



Repository Location: NonSearchable

quote **Add File** Create Folder
(empty)

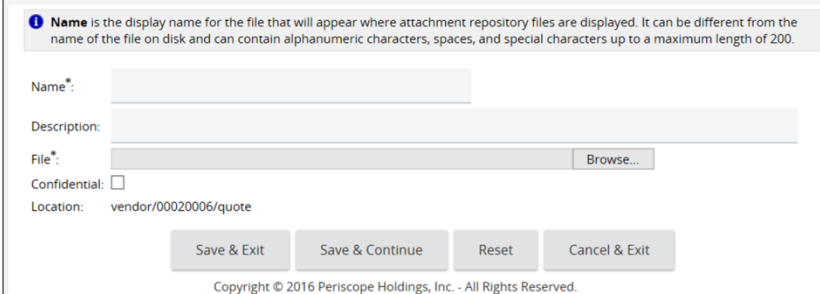
Exit

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Step 19: Uploading Files to the Attachment Repository

1. Click the **Add File** link.

Add File



Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name of the file on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Name*:

Description:

File*: Browse...

Confidential: ☐

Location: vendor/00020006/quote

Save & Exit Save & Continue Reset Cancel & Exit

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Step 20: Adding Files

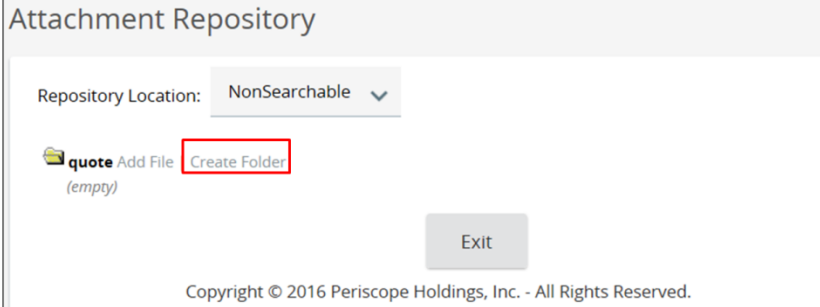
1. Enter a **Name** and **Description** for the file.
2. Click the **Browse** button to locate the file you wish to attach.
3. Click **Save & Exit** to return to the previous page. The file will now be available for attachment when submitting quotes.

Job Aid:

Maintain Organization Information for COMMBUYS Vendor Account

Screenshot

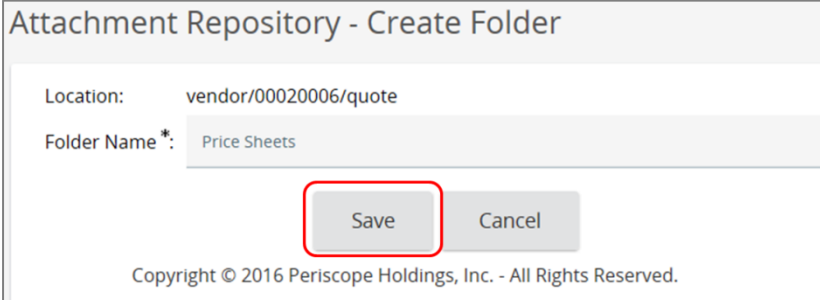
Directions



The screenshot shows the 'Attachment Repository' interface. At the top, it says 'Attachment Repository'. Below that, there is a 'Repository Location:' dropdown menu set to 'NonSearchable'. Underneath, there is a folder icon labeled 'quote' with the text 'Add File' and '(empty)'. To the right of the folder icon is a red-bordered button labeled 'Create Folder'. At the bottom right is a grey 'Exit' button. At the very bottom, it says 'Copyright © 2016 Periscope Holdings, Inc. - All Rights Reserved.'

Step 20: Creating Folders in the Attachment Repository

1. Click the **Create Folder** link.



The screenshot shows the 'Attachment Repository - Create Folder' dialog box. It has a 'Location:' field with the value 'vendor/00020006/quote'. Below that is a 'Folder Name *:' field with the value 'Price Sheets'. At the bottom, there are two buttons: 'Save' (highlighted with a red border) and 'Cancel'. At the very bottom, it says 'Copyright © 2016 Periscope Holdings, Inc. - All Rights Reserved.'

Step 21: Creating Folders in the Attachment Repository

1. Add the name of the folder to use for file storage and click **Save**. The new folder will now be available for file storage.